

Baltic Transport
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Journal



BALTIC YEARBOOK 2021/22

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Dear Readers,



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Last year, we wrote about the continued impact of the pandemic on the Baltic port market. Whereas it seems that at least some negatives of COVID-19 are a thing of the past, even though passenger traffic is still noticeably behind pre-corona levels, another black swan has started ruffling Baltic waters.

Russia's war of aggression against Ukraine has sent shock waves also through the world of transport & logistics. This year's instalment of the Baltic Yearbook hosts the second update to our War & logistics. The impact of the Russian aggression on Ukraine on transportation article, a work-in-progress piece first published on LinkedIn about a month into the war. Volume-wise, Russia's Baltic seaports topped the regional port chart, owing their position to bulk exports, liquid and dry. Judging from H1 2022 figures, which include double-digit increases in Ust-Luga and Primorsk, the corresponding economic war waged by the West on Russia will take time before it thwarts the latter's exports of hydrocarbons. Supply chain patterns, notably of energy commodities, are being rewritten as you read this. Much has already happened on the general cargo front, with St. Petersburg losing over one-third of its container traffic while Kaliningrad saw more than half of theirs vanish into thin air.

Not seen in recent years, the unprecedented high wave of inflation rubs salt into the wound, squeezing ordinary folk's budgets like an overripe lemon. Climate change hasn't gone anywhere, as evidenced by this summer's scorching heat. On the brighter side, the Baltic transport 2021 highlights summary brings shiploads of positive developments, particularly regarding different decarbonisation efforts, off- and onshore. Though it might sound like getting ahead of ourselves, 2022 will also likely yield plenty of good news for our planet – at least in the Baltic and its nearest vicinity. Till then, please enjoy the newest Baltic Yearbook and all it is renowned for: statistics, figures, insights, reporting, maps, shipping & rail networks, and numerous other data-rich goodies.

We wish you nothing but a fantastic read! Stay afloat, even if we are about to enter very murky waters!

Przemysław Myszkowski, Editor-in-Chief

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Note from the editors:

This Yearbook is based on our own data research and analysis performed till September 2022, and includes our personal findings, interpretations, and assumptions, based on national statistics and information received directly from the companies, associations, and institutions. The majority of networks and figures were confirmed, when it was possible. However, there always exists a margin of error. We will appreciate your feedback, suggestions, and all arguments that might help us make this publication better in the future.

If you wish to share your view with us, please do not hesitate to contact us: editorial@baltictransportjournal.com

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Baltic Yearbook 2021/22 highlights:

- Total port cargo turnover: 912.9mt
- General cargo: 342.8mt
- Liquid bulk: 312.9mt
- Dry bulk: 257.3mt
- Ro-ro & ferry: 11.6m trucks, trailers & railcars
- Containers: 11.4m TEUs
- Universal Cargo Units: 28.8m
- Passenger traffic: 59.6m
- Shipping networks: Baltic, North and Irish Seas, the English Channel, and Atlantic Europe
- Fleets: total and average sizes for all operators – ro-ro, ferry, and container
- Analysis: key Baltic transport & logistics 2021 events & trends
- Analysis: the impact of the Russian aggression on Ukraine on transportation
- Maps of Baltic seaports: charts with total freight, general cargo, liquid & dry bulk, ro-ro cargo units, TEUs, passengers (incl. cruise), and private cars in ferry traffic



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